

# Department of **GENERAL SERVICES** **PROCUREMENT DIVISION**

**Updated 11262014**

# **How to do Business with CA State Government**

## ***Secrets to Success***

### **Outreach Liaison**

**Department of General Services**

**Procurement Division**

**Certification and Outreach Branch**

**707 3rd Street**

**West Sacramento, CA 95605**

**[Wayne.Gross@dgs.ca.gov](mailto:Wayne.Gross@dgs.ca.gov)**

California Department of General Services  
Procurement Division



# How to **do Business** with California State **Government**

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## A 5-STEP PROCESS

# OBJECTIVES

**By the end of this webinar, you will be able to discuss:**

- State Agency Recognition Awards
- Consolidated Annual Report
- Upcoming Solicitations
- Eliminating Bid Sync Links Plus emails
- Profile Update
- eProcurement Registration Instructions
- Tips for Success

## eProcurement

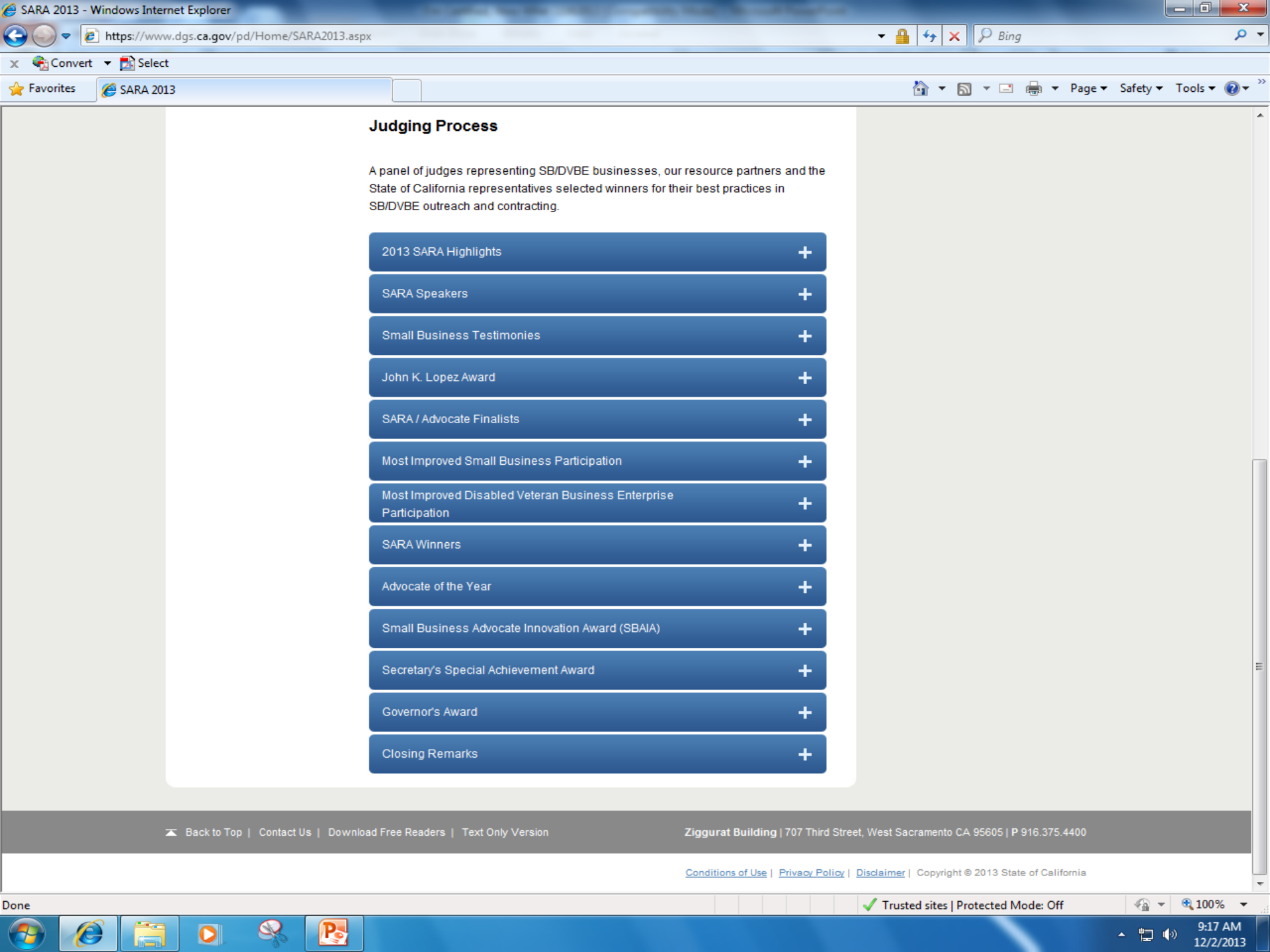
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## eProcurement Resources

- Release of Cloud Computing Special Provisions for ...
- Small Business & DVBE Outreach Events 2014 ...

## PD Quick Links

- PD Upcoming Solicitations
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- Leveling the Playing Field (PowerPoint)
- Updating Your Profile - Instructions
- eProcurement Registration Instructions



## Judging Process

A panel of judges representing SB/DVBE businesses, our resource partners and the State of California representatives selected winners for their best practices in SB/DVBE outreach and contracting.

- 2013 SARA Highlights +
- SARA Speakers +
- Small Business Testimonies +
- John K. Lopez Award +
- SARA / Advocate Finalists +
- Most Improved Small Business Participation +
- Most Improved Disabled Veteran Business Enterprise Participation +
- SARA Winners +
- Advocate of the Year +
- Small Business Advocate Innovation Award (SBAIA) +
- Secretary's Special Achievement Award +
- Governor's Award +
- Closing Remarks +

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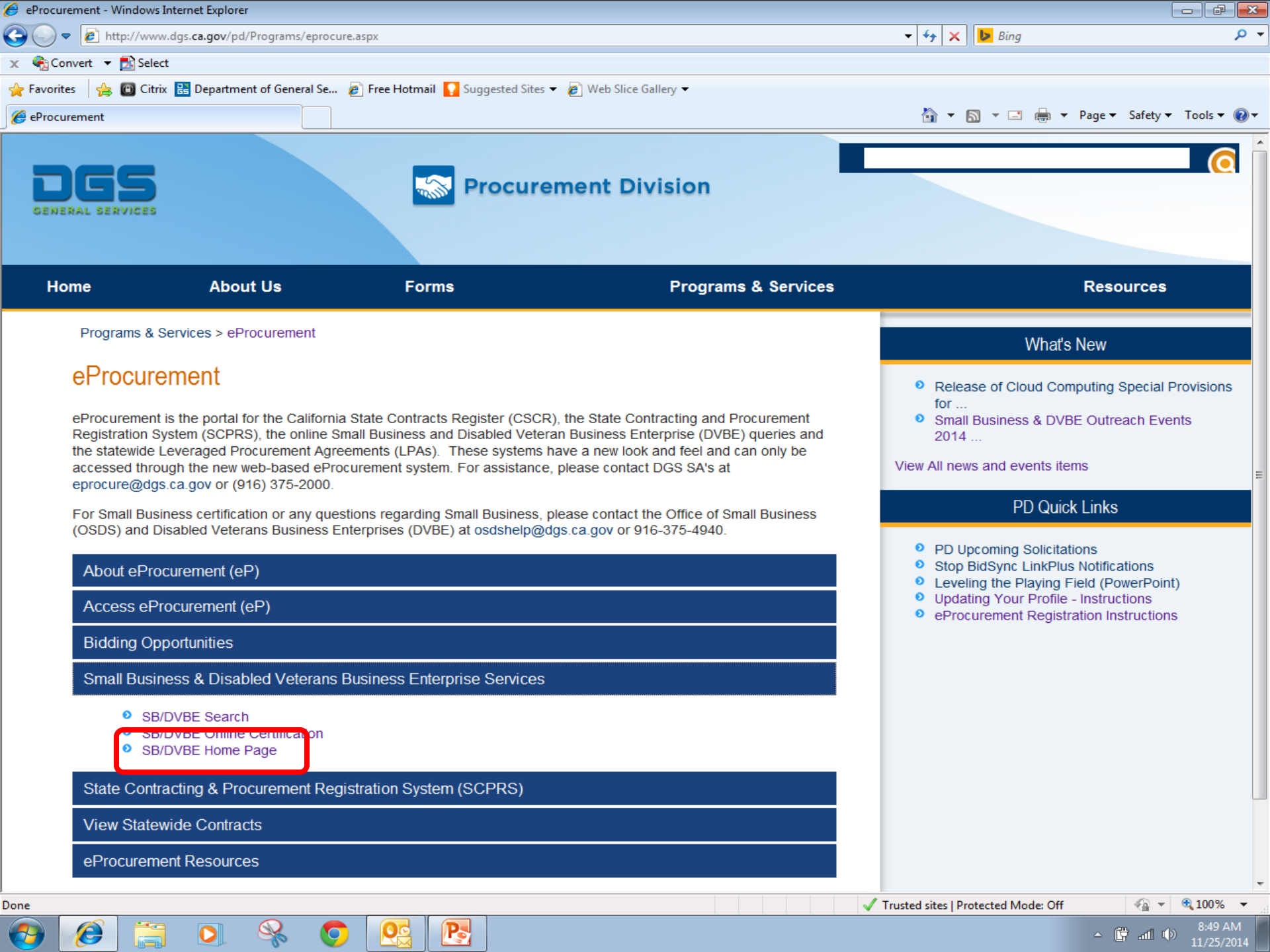
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## Office of Small Business & Disabled Veteran Business Enterprise Services (OSDS)

The DGS PD, Office of Small Business and DVBE Services (OSDS) is the State's certifying agency that administers the Small Business and DVBE Certification Programs.

In addition, the Communications & Outreach Section assists Small and Disabled Veteran businesses by participating in outreach events, providing resource guidance and supporting the businesses through advocacy.

SB / DVBE Certification Program

Search for SB / DVBE Suppliers

Nonprofit/NVSA Programs

Suspended Firm Listing

How Do I?

Contact OSDS

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### PD Quick Links

- Notice of Rulemaking
- SB/DVBE Legislation & Executive Orders
- Broadcast Bulletins
- Communications & Outreach
- RESD Small Business and DVBE Outreach Program
- SB/DVBE Reports**
- Procurement
- Prompt Payment
- DVBE Substitution Instructions and Form
- How to Establish Disabled Veteran Business Enterprise (DVBE) Equipment Ownership for **New Certifications**
- How to Establish Disabled Veteran Business Enterprise (DVBE) Equipment Ownership for **Renewal Certifications**

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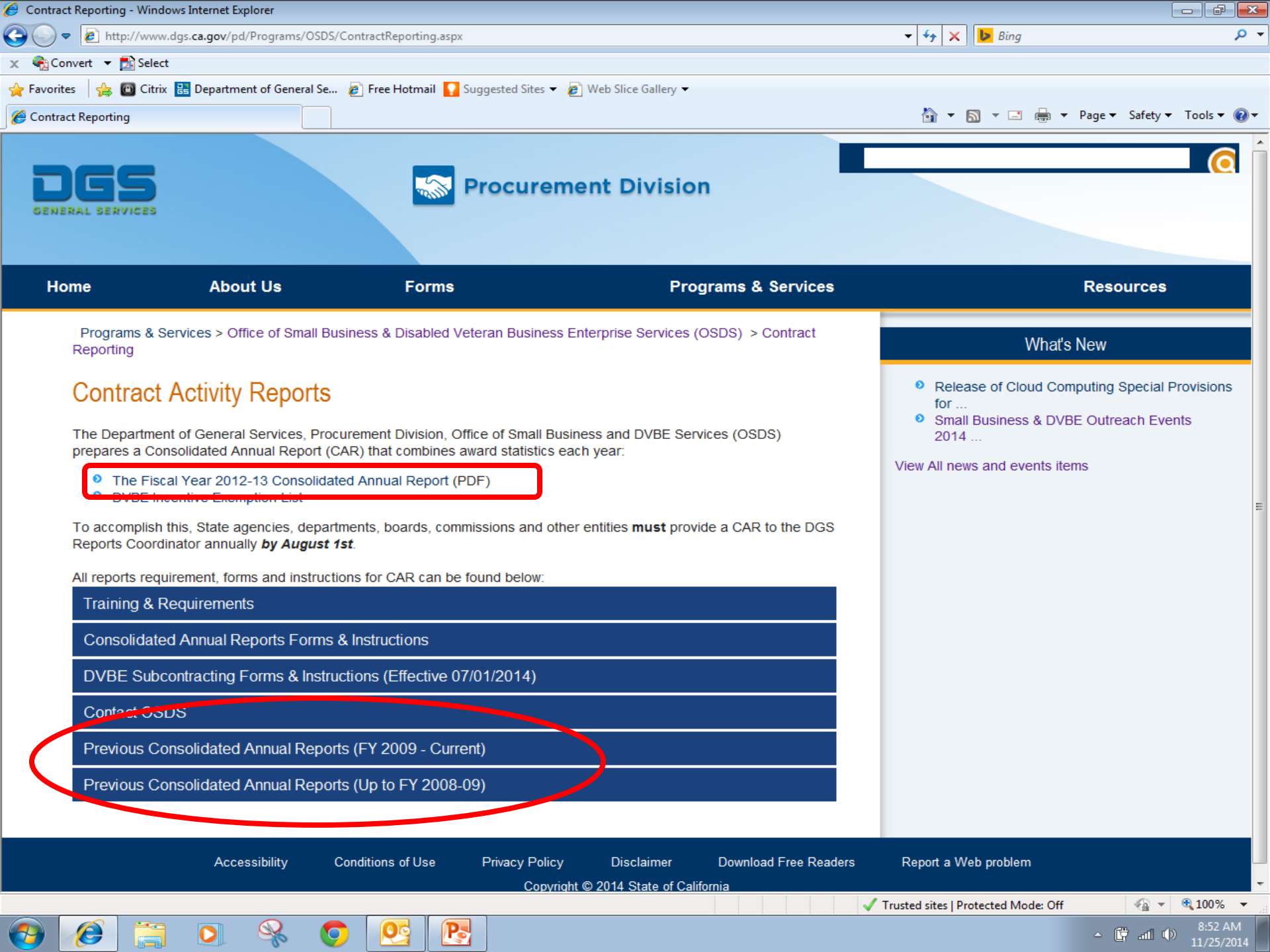
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## Contract Activity Reports

The Department of General Services, Procurement Division, Office of Small Business and DVBE Services (OSDS) prepares a Consolidated Annual Report (CAR) that combines award statistics each year:

- [The Fiscal Year 2012-13 Consolidated Annual Report \(PDF\)](#)
- [DVBE Incentive Exemption List](#)

To accomplish this, State agencies, departments, boards, commissions and other entities **must** provide a CAR to the DGS Reports Coordinator annually **by August 1st**.

All reports requirement, forms and instructions for CAR can be found below:

[Training & Requirements](#)

[Consolidated Annual Reports Forms & Instructions](#)

[DVBE Subcontracting Forms & Instructions \(Effective 07/01/2014\)](#)

[Contact OSDS](#)

[Previous Consolidated Annual Reports \(FY 2009 - Current\)](#)

[Previous Consolidated Annual Reports \(Up to FY 2008-09\)](#)

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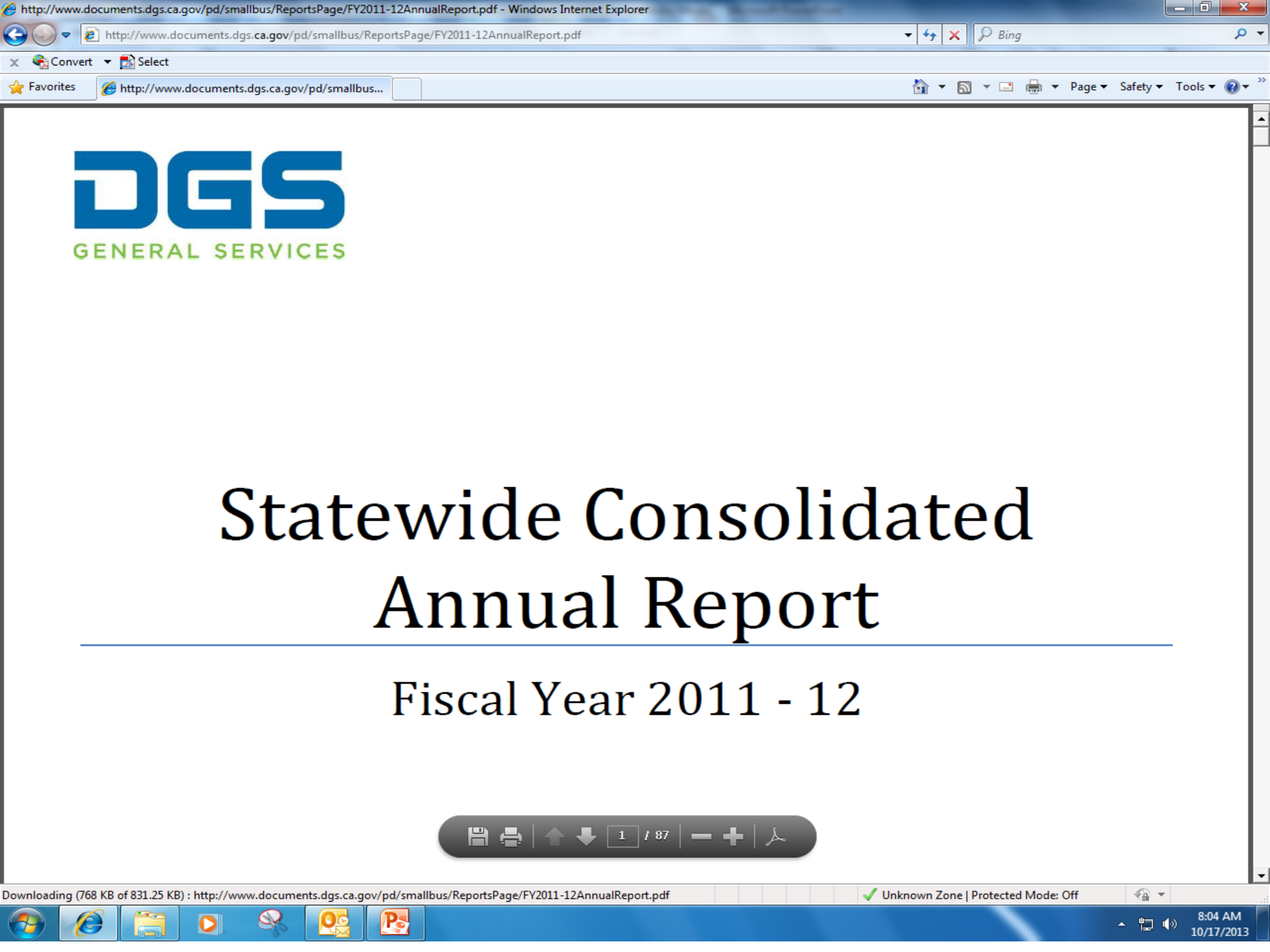
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# Statewide Consolidated Annual Report

Fiscal Year 2011 - 12

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### Upcoming Solicitations Procurement Division

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Procurement Division

Location	Contract Title/Description	Anticipated Release Date	Point of Contact	Phone Number	Email
Statewide	Powdered Milk	November 1, 2014	Jennifer Balluch	(916) 375-4403	<a href="mailto:jennifer.balluch@dgs.ca.gov">jennifer.balluch@dgs.ca.gov</a>
Statewide	Dried Fruit	November 1, 2014	Jennifer Balluch	(916) 375-4403	<a href="mailto:jennifer.balluch@dgs.ca.gov">jennifer.balluch@dgs.ca.gov</a>
Statewide	Bulk Cereal	November 1, 2014	Jennifer Balluch	(916) 375-4403	<a href="mailto:jennifer.balluch@dgs.ca.gov">jennifer.balluch@dgs.ca.gov</a>
Statewide	Margarine	November 1, 2014	Dave Henning	(916) 375-4544	<a href="mailto:dave.henning@dgs.ca.gov">dave.henning@dgs.ca.gov</a>
Statewide	Pizza	November 1, 2014	Dave Henning	(916) 375-4544	<a href="mailto:dave.henning@dgs.ca.gov">dave.henning@dgs.ca.gov</a>
Statewide	Crackers	November 1, 2014	Jennifer Jee	(916) 375-5926	<a href="mailto:jennifer.jee@dgs.ca.gov">jennifer.jee@dgs.ca.gov</a>
Statewide	Maple Syrup	November 1, 2014	Jennifer Jee	(916) 375-5926	<a href="mailto:jennifer.jee@dgs.ca.gov">jennifer.jee@dgs.ca.gov</a>
Statewide	Tuna	November 1, 2014	Ashley Lockwood	(916) 375-4575	<a href="mailto:ashley.lockwood@dgs.ca.gov">ashley.lockwood@dgs.ca.gov</a>
Statewide	Frozen Turkey	November 1, 2014	Ashley Lockwood	(916) 375-4575	<a href="mailto:ashley.lockwood@dgs.ca.gov">ashley.lockwood@dgs.ca.gov</a>
Statewide	Shortening & Salad Oil	November 1, 2014	Sarah Husarik	(916) 375-4432	<a href="mailto:sarah.husarik@dgs.ca.gov">sarah.husarik@dgs.ca.gov</a>
Statewide	Canned Entrees	November 1, 2014	Sarah Husarik	(916) 375-4432	<a href="mailto:sarah.husarik@dgs.ca.gov">sarah.husarik@dgs.ca.gov</a>
Statewide	Fixed Wing Airplane	January 1, 2015	Eileen Tardiff	(916) 375-4463	<a href="mailto:eileen.tardiff@dgs.ca.gov">eileen.tardiff@dgs.ca.gov</a>
Statewide	Frozen Dietary Entrees	January 1, 2015	Jennifer Jee	(916) 375-5926	<a href="mailto:jennifer.jee@dgs.ca.gov">jennifer.jee@dgs.ca.gov</a>
Statewide	Pharmaceutical Benefit Manager	February 3, 2015	Mary Anne Selvage	(916) 375-4346	<a href="mailto:maryanne.selvage@dgs.ca.gov">maryanne.selvage@dgs.ca.gov</a>
Statewide	Bulk Sugar	February 1, 2015	Jennifer Balluch	(916) 375-4403	<a href="mailto:jennifer.balluch@dgs.ca.gov">jennifer.balluch@dgs.ca.gov</a>
Statewide	Dehydrated Potatoes	February 1, 2015	Jennifer Balluch	(916) 375-4403	<a href="mailto:jennifer.balluch@dgs.ca.gov">jennifer.balluch@dgs.ca.gov</a>
Statewide	Spices	February 1, 2015	Dave Henning	(916) 375-4544	<a href="mailto:dave.henning@dgs.ca.gov">dave.henning@dgs.ca.gov</a>
Statewide	Pantry Items	February 1, 2015	Dave Henning	(916) 375-4544	<a href="mailto:dave.henning@dgs.ca.gov">dave.henning@dgs.ca.gov</a>
Statewide	Chips & Snacks	February 1, 2015	Ashley Lockwood	(916) 375-4575	<a href="mailto:ashley.lockwood@dgs.ca.gov">ashley.lockwood@dgs.ca.gov</a>
Statewide	Frozen Potato & Onion Product	February 1, 2015	Sarah Husarik	(916) 375-4432	<a href="mailto:sarah.husarik@dgs.ca.gov">sarah.husarik@dgs.ca.gov</a>
Statewide	Beverage Base	February 1, 2015	Sarah Husarik	(916) 375-4432	<a href="mailto:sarah.husarik@dgs.ca.gov">sarah.husarik@dgs.ca.gov</a>
Statewide	"Smart" Electric Vehicle Chargers	May 1, 2015	Dion Campos	(916) 375-4478	<a href="mailto:dion.campos@dgs.ca.gov">dion.campos@dgs.ca.gov</a>
Statewide	Roast Beef	May 1, 2015	Dave Henning	(916) 375-4544	<a href="mailto:dave.henning@dgs.ca.gov">dave.henning@dgs.ca.gov</a>

View Current Solicitations:

[www.eprocure.dgs.ca.gov](http://www.eprocure.dgs.ca.gov)  
Under Bidding Opportunities,  
Click View CSCR ADs,  
Search by Keyword or UNSPSC Code

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**Step 1:** Log on to ***www.eprocure.dgs.ca.gov***—In the Access *eProcurement* (eP) box (second blue bar), **click** *Login*. Enter your user name and password. (Call Bidsync at 1-800-990-9339 if user name and/or password are forgotten. They are case-sensitive.)

**Step 2:** **Click** My Account located in the blue bar at the top of the page.

**Step 3:** **Click** Company profile on the left side of the page.

**Step 4:** **Click** Notifications

- Under Notification settings: Agency types: **ONLY State** should be checked.
- Under Notification type & frequency, e-mail: Make sure that the last two items are UNCHECKED (“Send me a daily list of BidSync Links Plus bids” and “Send me exclusive special offers and promotions”). Click Save.

**Step 5:** **Click** Classifications, Under Regions, Click Manage regions and verify that California is the only state checked. Click the “+” symbol to the left of California and select the counties in which you want to do business.



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# Leveling the Playing Field

## (Updating Your Profile)

### eProcurement



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**Updated 11062013**

These instructions are to accompany the Power Point "Leveling the Playing Field". Make a copy of the Power Point presentation, number the slides (1) to (62), and follow these instructions. Word/Excel 2010 versions used.

- [www.eprocure.dgs.ca.gov](http://www.eprocure.dgs.ca.gov) (Make this link a favorite) (1) (2)
- CLICK the 4<sup>th</sup> Blue Bar-Small Business and DVBE Services (3)
- CLICK SB/DVBE SEARCH (4)
- SCROLL down to Keywords, put in a keyword, SCROLL down to bottom left of page and CLICK SEARCH (5) (6) (7)
- CLICK Generate Export List (CSV Format) located at the top right of the page (8)
- OPEN , SAVE to desktop (9) (10)

**How to update your keywords:**

- HIGHLIGHT ENTIRE Column R, COPY and PASTE into a new Word document. You are limited to 255 characters: eliminate words that don't belong, don't repeat words, don't use periods, commas, extraneous words like: and, the, no, &'s. Your profile should look like this: word space word space, etc. (11) (12) (13)
- TOOLS, WORD COUNT ((Characters (with spaces) cannot exceed 255 characters) (14) (15)
- TOOLS, SPELLING AND GRAMMAR, SPELL CHECK (16) (17)
- SAVE Word document for profile (18)

**How to update your UNSPSC Classification codes:**

- GO BACK to the Generate Export List and HIGHLIGHT ENTIRE Column Q, COPY and PASTE into a new Excel spreadsheet in Column A (19) (20) (21) (22)
- DELETE the entire line 1 (UNSPSC and \_NAICS\_CODES) (23) (24)
- HIGHLIGHT ENTIRE Column A (25)
- DATA, TEXT TO COLUMNS, DELIMITED, NEXT, UNCHECK TAB, CHECK SEMICOLON, NEXT, FINISH (This will put classifications codes into separate columns.) (26) (27) (28) (29) (30) (31)
- HIGHLIGHT A1 ONLY (32)
- VIEW, MACROS, RECORD MACRO, OK (33) (34) (35) (36)
- VIEW, MACROS, VIEW MACROS HIGHLIGHT Macro 1, EDIT, HIGHLIGHT the script and DELETE it from the page, COPY "JustDolt" Macro text from macro at the bottom of these instructions, PASTE on deleted script page, CLOSE page, CLICK RUN, RUN SUB/USER FORM, (Computer is now creating a list of UNSPSC classification codes) (37) (38) (39) (40) (41) (42) (43)
- CLICK the X (Excel Icon on the top left side of page under File) (44) (45) *Please wait....* You should have a list of UNSPSC classification codes in ascending order after a few minutes.
- SAVE and PRINT [You are **NOT** limited to the number of codes; however, make sure that you use only the applicable ones! [If your list is long, you may want to save paper and cut/paste the document and make it look like Slide 46.] (46) (47)

**How to update your profile:**

- [www.eprocure.dgs.ca.gov](http://www.eprocure.dgs.ca.gov) (FAVORITE) (48)
- CLICK the 2<sup>nd</sup> Blue Bar-Access eProcurement (49)
- LOGIN using your Bidsync User name and Password (50) (51)
- CLICK My Account (52)
- CLICK Company profile located on the left side of the page (53)
- Under Classifications, CLICK UNSPSC Classifications, CLICK EDIT UNSPSC classifications (54) (55) (56)... (Individually UPDATE each UNSPSC code using your printed Excel spreadsheet list and save.)
- Under Edit keywords, UPDATE keywords. You can have up to 12 words for your BidSync profile. (57)
- CLICK My Account and Under Agency profile registrations, CLICK The State of California (58)
- Under CERTIFICATIONS, CLICK Register your business with The State of California (59)
- Under Edit Options, CLICK Amend Application (60)

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eProcurement

eProcurement is the portal for the California State Contracts Register (CSCR), the State Contracting and Procurement Registration System (SCPRS), the online Small Business and Disabled Veteran Business Enterprise (DVBE) queries and the statewide Leveraged Procurement Agreements (LPAs). These systems have a new look and feel and can only be accessed through the new web-based eProcurement system. For assistance, please contact DGS SA's at [eprocure@dgs.ca.gov](mailto:eprocure@dgs.ca.gov) or (916) 375-2000.

For Small Business certification or any questions regarding Small Business, please contact the Office of Small Business (OSDS) and Disabled Veterans Business Enterprises (DVBE) at [osdshelp@dgs.ca.gov](mailto:osdshelp@dgs.ca.gov) or 916-375-4940.

About eProcurement (eP)

Access eProcurement (eP)

Bidding Opportunities

Small Business & Disabled Veterans Business Enterprise Services

State Contracting & Procurement Registration System (SCPRS)

View Statewide Contracts

eProcurement Resources

What's New

Release of Cloud Computing Special Provisions for ...

Small Business & DVBE Outreach Events 2014 ...

View All news and events items

PD Quick Links

PD Upcoming Solicitations

Stop BidSync LinkPlus Notifications

Leveling the Playing Field (PowerPoint)

Updating Your Profile - Instructions

eProcurement Registration Instructions

Accessibility

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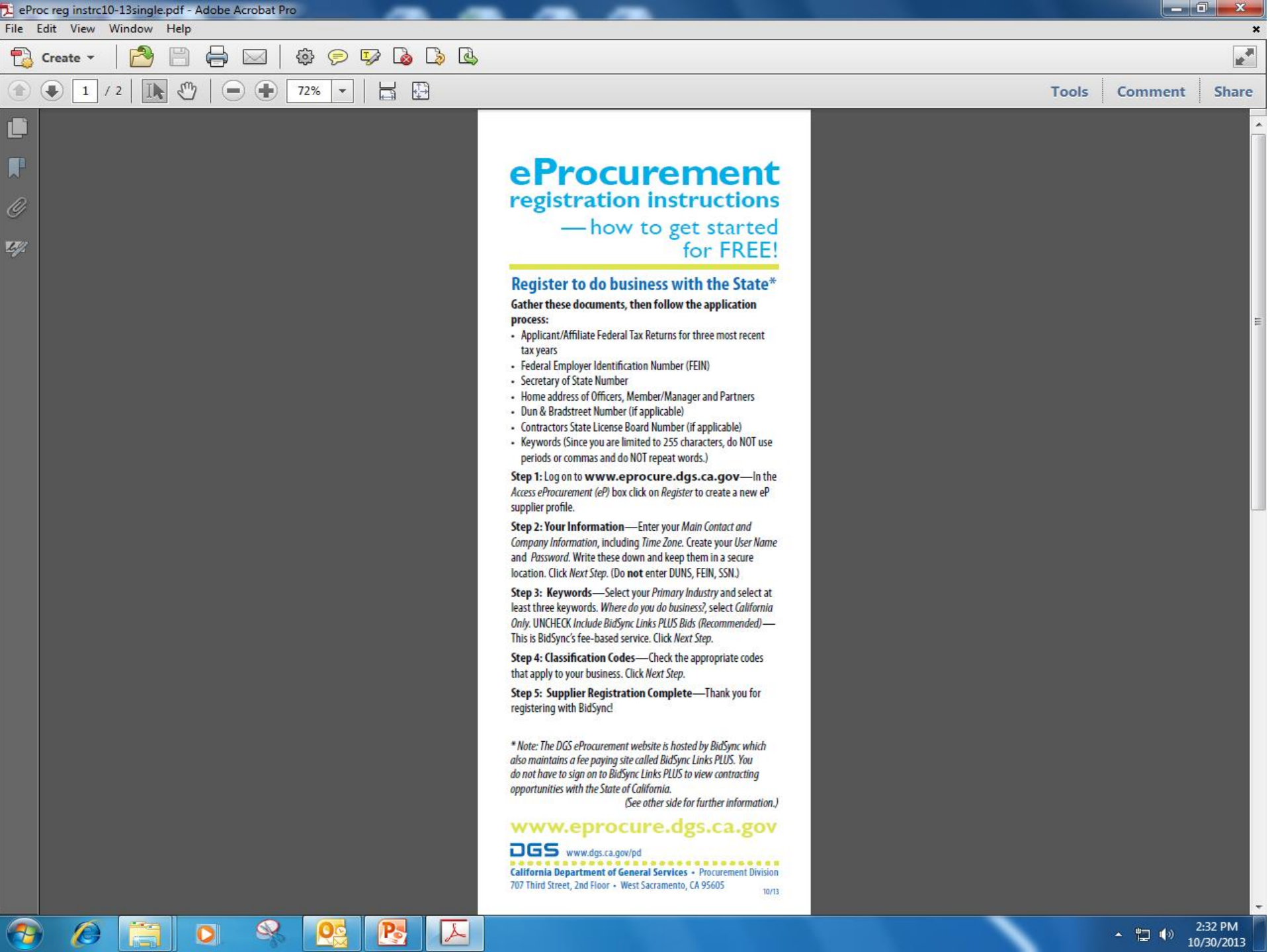
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# Tips for Success

- **BE PROACTIVE**
- **Keep your business information up-to-date**
  - to ensure you receive important information. Don't miss out on a business opportunity by letting your SB/DVBE certification lapse.

# Tips for Success

- **Make sure you are properly licensed and Insured**
  - some State jobs require licensing and insurance.

# Tips for Success

- **Be Responsive**

- submit a complete and timely bid package that complies with all aspects of the State's solicitation. One missing item can dismiss your entire bid package. For clarification, contact the contracting/purchasing official.



# Tips for Success

- **Be Responsible**

- demonstrate how you will fulfill the solicitation's requirements and specifications and show how your proposal gives the State the best value regarding product pricing, product quality and timely product delivery.



# Tips for Success

- **If your business secures a State contract**
  - you are legally bound to deliver as promised. Many contracts do not pay until the job is completed; be sure you can meet all aspects of the contract including the financial impact on your business. Make sure that your performance has a positive impact on your future opportunities

# SUMMARY

**You now know about:**

- State Agency Recognition Awards
- Consolidated Annual Report
- Upcoming Solicitations
- Eliminating Bid Sync Links Plus emails
- Profile Update
- eProcurement Registration Instructions
- Tips for Success

# QUESTIONS

Thank you for participating in our presentation

We wish you success!

Email us at:

- [Wayne.Gross@dgs.ca.gov](mailto:Wayne.Gross@dgs.ca.gov)
- [Advocate@dgs.ca.gov](mailto:Advocate@dgs.ca.gov) or

Phone us at **(800) 559-5529 X 3#**